

Chapter 2 Procedures

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1 ARCHIVE PROCESSING

1.1 Agency Database Archive

Overview The AGPS System Administrator has the responsibility to archive the Agency Database in AGPS freeing up the file space for new processing. An agency may not be archived if that agency number is found in the check of the following tables. When an agency record has been identified for archiving, all related records will also be archived and removed from the agency and history databases.

Inputs **!** Tables to be checked: AGCY, BAPV, BAUD, COMM, HIST, KACG, KARD, KCAC, KCAS, KINV, KLCT, KLIN, KONT, KPAG, MPAC, MPIP, OACG, OAMT, OCAC, OCLN, OINV, OLIN, OPAG, OPAY, ORDR, OREC, PAPV, PHLD, RACG, RLIN, RQSN, SDOC, TEXT, VAWD, VBID, VCOM, VEND

Outputs **!** Tables to be archived: AACG, ACAD, ADET, AGCY, AGRP, AHST, ANOA, AOBJ, ASDT, ASUM, BAPV, CAGY, CAIN, CASA, CASV, CATX, CPUR, CSUB

Completing The Procedure

<u>Cross-Reference</u>	<u>Steps</u>
	1. Determine the agency records to be archived. Agency records must be at a status 9' to be a candidate for archiving.
	2. Verify the AGCY record status = 9. If it is not 9 and record is to be archived;
AGCY 4: AGCY	<p>a. If the user is not in the AGCY screen, type AGCY in the Function Line and press RETURN/ENTER.</p> <p>b. Type INQUIRE in the Function Line.</p> <p>c. Using the TAB key, move to Agency Number field and type desired agency number.</p> <p>d. Press RETURN/ENTER. Requested agency number record should be displayed.</p>
	3. Type CHANGE in the Function Line.

DATABASE ARCHIVE PROCESS

PROCEDURES

1.1 Agency Database Archive

Cross-Reference

Steps

- a. Using the TAB key, move to Status Code field and type **9**.
4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

1.1.1 Agency Address Archive

Overview Agency addresses often become obsolete and should be archived from AGPS. An agency address will not be archived if the combination of agency number and sub-agency number is found in the check of the following tables. When an agency address record has been identified for archiving, it will be removed from the agency database.

Inputs ! Tables to be checked: KLIN, KONT, OCLN, OLIN, ORDR, RLIN, RQSN

Outputs ! Table to be archived: AADR

Completing The Procedure

Cross-Reference

Steps

1. Determine the agency address records to be archived. Agency address records must be at a status 9 to be a candidate for archiving.
2. Verify the AADR record status = 9. If it is not 9 and record is to be archived;
 - a. If the user is not in the AADR screen, type **AAADR** in the Function Line and press RETURN/ENTER.
 - b. Type **INQUIRE** in the Function Line.
 - c. Using the TAB key, move to Agency Number field and type desired agency number.
 - d. Using the TAB key, move to the Sub-Agency Number field and type desired sub-agency number.
 - e. Press RETURN/ENTER. Requested agency address record should be displayed.
3. Type **CHANGE** in the Function Line.
 - a. Using the TAB key, move to Status Code field and type **9**.

AGCY 4: AADR

HISTORY DATABASE INQUIRY

PROCEDURES

1.1.1 Agency Address Archive

Cross-Reference

Steps

4. Press RETURN/ENTER.

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

1.1.2 Agency Buyer Archive

Overview Agency buyer records often become obsolete and should be archived from AGPS. An agency buyer record will not be archived if the combination of agency number and agency buyer code is found in the check of the following tables. When an agency buyer record has been identified for archiving, it will be removed from the agency database.

Inputs ! Tables to be checked: AGCY, KONT, ORDR, RQSN, SDOC

Outputs ! Table to be archived: ABUY

Completing The Procedure

Cross-Reference

Steps

1. Determine the agency buyer records to be archived. Agency buyer records must be at a status 9 to be a candidate for archiving.
2. Verify the ABUY record status = 9. If it is not 9 and record is to be archived;
 - a. If the user is not in the ABUY screen, type **ABUY** in the Function Line and press RETURN/ENTER.
 - b. Type **INQUIRE** in the Function Line.
 - c. Using the TAB key, move to Agency Number field and type desired agency number.
 - d. Using the TAB key, move to the Agency Buyer field and type desired agency buyer code.
 - e. Press RETURN/ENTER. Requested agency buyer code record should be displayed.
3. Type **CHANGE** in the Function Line.
 - a. Using the TAB key, move to Status Code field and type **9**.
4. Press RETURN/ENTER.

HISTORY DATABASE INQUIRY

PROCEDURES

1.1.2 Agency Buyer Archive

Cross-Reference

Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

1.2 Agency Approver Database Archive

Overview

The AGPS System Administrator has the responsibility to archive the Agency Approver Database in AGPS freeing up the file space for new processing. An agency approval record will not be archived if the agency number is found in the check of the following tables. When an agency approval record has been identified for archiving, it will be removed from the agency approver database.

Inputs

! Tables to be checked: PAPV, PHLD

Outputs

! Table to be archived: BAPV

Completing The Procedure

Cross-Reference

Steps

EAP 4: BAPV

1. Determine the agency approval records to be archived. Agency approval records must be at a status '9' to be a candidate for archiving.
2. Verify the BAPV record status = 9. If it is not 9 and record is to be archived;
 - a. If the user is not in the BAPV screen, type **BAPV** in the Function Line and press RETURN/ENTER.
 - b. Type **INQUIRE** in the Function Line.
 - c. Using the TAB key, move to Type Approval field and type desired approval type.
 - d. Using the TAB key, move to Approval Category field and type desired approval category.
 - e. Using the TAB key, move to Approval Sequence field and type desired approval sequence.
 - f. Using the TAB key, move to Approval Agency field and type desired approval agency.
 - g. Using the TAB key, move to Approver USERID field and type desired approver USERID.

HISTORY DATABASE INQUIRY PROCEDURES

PROCEDURES

1.2 Agency Approver Database Archive

Cross-Reference	Steps
	<ol style="list-style-type: none"> h. Press RETURN/ENTER. Requested agency approver record should be displayed.
	<ol style="list-style-type: none"> 3. Type CHANGE in the Function Line. <ol style="list-style-type: none"> a. Using the TAB key, move to approver Status field and type 9. b. Using the TAB key, move to Authorization field and type desired authorization code for user.
	<ol style="list-style-type: none"> 4. Press RETURN/ENTER.
	<p>NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.</p>

1.3 Commodity Database Archive

Overview

The AGPS System Administrator has the responsibility to archive the Commodity Database in AGPS freeing up the file space for new processing. A commodity record will not be archived if the commodity number is found in the check of the following tables. When a commodity record has been identified for archiving, all related records will also be archived and removed from the commodity and history databases.

Inputs

! Tables to be checked: KDEC, KILN, KLIN, KONT, MPIP, OCLN, OLIN, OQTY, ORDR, RLIN, RQSN, VAWD, VCOM

Outputs

! Tables to be archived: ACAD, AHST, CAGY, CAIN, CASA, CASV, CATX, CGEO, CKWD, COBJ, COMM, CPUR, CSPC, CSUB, CSVN, CUOM

Completing The Procedure

Cross-Reference

Steps

COMM 4: COM2

1. Determine the commodity records to be archived. Commodity records must be at a status 9 to be a candidate for archiving.
2. Verify the COMM record status = 9. If it is not 9 and record is to be archived;
 - a. If the user is not in the COM2 screen, type **COM2** in the Function Line and press RETURN/ENTER.
 - b. Type **INQUIRE** in the Function Line.
 - c. Using the TAB key, move to Commodity Number field and type desired commodity number.
 - d. Press RETURN/ENTER. Requested commodity number record should be displayed.
3. Type **CHANGE** in the Function Line.
 - a. Using the TAB key, move to Status Code field and type **9**.
4. Press RETURN/ENTER.

HISTORY DATABASE INQUIRY

PROCEDURES

1.3 Commodity Database Archive

Cross-Reference

Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

1.4 Contract Database Archive

Overview

The AGPS System Administrator has the responsibility to archive the Contract Database in AGPS freeing up the file space for new processing. Contracts will be selected for archiving when they meet the criteria below. When a contract has been identified for archiving, all related records will also be archived and removed from the contract and history databases.

Inputs

- ! Tables to be checked: ORDR, OLIN, KONT, RQSN
- ! Required processing parameter(s)

Outputs

- ! Tables to be archived: HDET, HIST, KCHG, KCIL, KCLU, KCTX, KDEC, KLCT, KLDM, KLFY, KLIN, KLPC, KLUM, KMOD, KNOA, KNTE, KOFY, KONT, KVCH, KVDL, KVTX, PAPV, PHLD

Completing The Procedure

Cross-Reference

Steps

Contracts will be selected for archiving when the following criteria are met:

1. End Date (Revised End Date if there is one) must be < or = the parameter cutoff date; and
 2. There are no orders in the system against the contract; and
 3. If the contract is tied to a requisition, all contracts tied to the same requisition must also be candidates for archiving, or no contracts tied to that requisition will be archived.
1. Determine the parameter(s) to be used for contract database archive.

Cutoff Date Parameter

The cutoff date parameter is determined by one of two methods. It is either computed or specifically stated. If it is not specifically stated, the cutoff date is computed by taking the current Fiscal Year and subtracting two years, then converting the product to a calendar year. This is then joined with the BINS Table Fiscal Year End Day and Month and becomes the "cutoff date" for record selection. Otherwise, the specific date stated in the system parameter will be used as the cutoff date. The cutoff date is then used to initially select contract records as potential archive candidates. If a specific cutoff date is to be used, the Systems Administrator must provide the date to the person submitting the job so it can be included in the PARM Card.

Cross-Reference

Steps

Document Type

If a valid cutoff date is specified, up to five contract transaction document types may be identified for specific archiving of records. If this type of processing is desired, the Systems Administrator must identify the "specific" three character document types to be archived. **IF A SPECIFIC CUTOFF DATE IS NOT USED, THIS PROCESS CANNOT BE USED.**

INST 4: BTAB

Document Type used a selection parameter for archive of contract records must be a valid document type entry in BTAB Table DK (Document Type - Contract).

2. Verify the KONT record scheduled/revised contract end date is less than cutoff date. If the scheduled/revised contract end date is not less than cutoff date and record is to be archived;

KONT 4: KONT

- a. If the user is not in the KONT screen, type **KONT** in the Function Line and press RETURN/ENTER.
- b. Type **INQUIRE** in the Function Line.
- c. Using the TAB key, move to Contract Number field and type desired contract number.
- d. Press RETURN/ENTER. Requested contract number record should be displayed.

3. Type **CHANGE** in the Function Line.

- a. Using the TAB key, move to Revised Contract End Date field and type date less than archive cutoff date.

NOTE: Change other revised dates as required to establish Revised Contract End Date less than archive cutoff date.

Contract Expiration Date (Contract End Date (Revised/Scheduled))

If no active contract release order records are found for a contract and it has been flagged as a potential archive record; then the revised contract end date (if present) or the scheduled contract end date is used to determine if the contract record may be archived. If the contract end date is less than or equal the "cutoff date", the contract will be archived.

4. Press RETURN/ENTER.

HISTORY DATABASE INQUIRY

PROCEDURES

1.4 Contract Database Archive

Cross-Reference

Steps

NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.

1.5 Order Database Archive

Overview

The AGPS System Administrator has the responsibility to archive the Order Database in AGPS freeing up the file space for new processing. Orders will be selected for archiving when they meet the criteria below. When an order has been identified for archiving, all related records will also be archived and removed from the order and history databases.

Inputs

! Tables to be checked: OACG, ORDR

! Required processing parameter(s)

Outputs

! Tables to be archived: ADET, BAUD, HDET, HIST, MPAC, MPIP, OACG, OAMT, OCAC, OCHG, OCLN, OCMD, OCTX, OILN, OINV, OLIN, OMOD, ONTE, OPAG, OPAY, OPLN, OQTY, ORDR, OREC, ORLN, OVTX, PAPL, PAPV, PHLD, VAWD

Completing The Procedure

Cross-Reference

Steps

Orders will be selected for archiving when the following criteria are met:

1. The archive order indicator on the order record is equal to >Y=, and
2. The fiscal year on the order is less than the cutoff fiscal year;
3. If the order is tied to a requisition, all orders tied to the same requisition must also be candidates for archiving, or no orders tied to that requisition will be archived; and
4. If the order is against a continuing appropriation (FUND and APPROP UNIT > spaces) and the status is equal to or greater than >490'. Continuing appropriation orders at a status <=490' will not be archived.

1. Determine the parameter(s) to be used for order database archive.

Cutoff Date Parameter

The cutoff date parameter is determined by one of two methods. It is either computed or specifically stated. If it is not specifically stated, the cutoff date is computed by taking the current Fiscal Year and subtracting two years, then converting the product to a calendar year. This is then joined with the BINS Table Fiscal Year End Day and Month and becomes the "cutoff date" for record selection. Otherwise, the specific date stated in the system parameter will be used as the cutoff date. The cutoff date is then used to initially select order records as potential

Cross-Reference

Steps

archive candidates. If a specific cutoff date is to be used, the Systems Administrator must provide the date to the person submitting the job so it can be included in the PARM Card.

Document Type

If a valid cutoff date is specified, up to five order transaction document types may be identified for specific archiving of records. If this type of processing is desired, the Systems Administrator must identify the "specific" three character document types to be archived. **IF A SPECIFIC CUTOFF DATE IS NOT USED, THIS PROCESS CANNOT BE USED.**

INST 4: BTAB

Document Type used a selection parameter for archive of order records must be a valid document type entry in BTAB Table DO (Document Type - Order).

2. Verify the archive order indicator on ORD5 is equal to >Y=. If the indicator was changed to >N=previously, but the order is now ready to be archived, contact the ISIS Help Desk and request the indicator to be changed.

1.6 Requisition Database Archive

Overview

The AGPS System Administrator has the responsibility to archive the Requisition Database in AGPS freeing up the file space for new processing. Requisitions will be selected for archiving when they meet the criteria below. When a requisition has been identified for archiving, all related records will also be archived and removed from the requisition and history databases.

Inputs

- ! Tables to be checked: KONT, ORDR, RACG, RQSN
- ! Required processing parameter(s)

Outputs

- ! Tables to be archived: BAUD, HDET, HIST, PAPL, PAPV, PHLD, RACG, RLIN, RLTX, RMOD, RNTE, RQSN, RTXL, RTXT, SRQN

Completing The Procedure

Cross-Reference

Steps

Requisitions will be selected for archiving when the following criteria are met:

1. The fiscal year on the requisition is less than the cutoff fiscal year;
2. There are no orders tied to the requisition;
3. There are no contracts tied to the requisition;
4. If the requisition is tied to a solicitation, all requisitions tied to the same solicitation must also be candidates for archiving, or no requisitions tied to that solicitation will be archived; and
5. If the requisition is against a continuing appropriation (FUND and APPROP UNIT > spaces) and the status is equal to or greater than >386', or equal >194', >197', >198', >199', >733', >794', >296', >297', >298', or >299'. Continuing appropriation requisitions at a status <=386', and not canceled will not be archived.

1. Determine the parameter(s) to be used for requisition database archive.

Cutoff Date Parameter

The cutoff date parameter is determined by one of two methods. It is either computed or specifically stated. If it is not specifically stated, the cutoff date is computed by taking the current Fiscal Year and subtracting two years, then converting the product to a calendar year. This is then joined with the BINS Table Fiscal Year End Day and Month and becomes the "cutoff date" for record selection. Otherwise, the specific date stated in the system parameter will be used as the cutoff date. The cutoff date is then used to initially select requisition records as

Cross-Reference

Steps

potential archive candidates. If a specific cutoff date is to be used, the Systems Administrator must provide the date to the person submitting the job so it can be included in the PARM Card.

Document Type

If a valid cutoff date is specified, up to five requisition transaction document types may be identified for specific archiving of records. If this type of processing is desired, the Systems Administrator must identify the "specific" three character document types to be archived. **IF A SPECIFIC CUTOFF DATE IS NOT USED, THIS PROCESS CANNOT BE USED.**

INST 4: BTAB

Document Type used a selection parameter for archive of requisition records must be a valid document type entry in BTAB Table DR (Document Type - Requisition).

1.7 Solicitation Database Archive

Overview

The AGPS System Administrator has the responsibility to archive the Solicitation Database in AGPS freeing up the file space for new processing. Solicitations will be selected for archiving when they meet the criteria below. When a solicitation has been identified for archiving, all related records will also be archived and removed from the solicitation and history databases.

Inputs

- ! Tables to be checked: SDOC, SRQN
- ! Required processing parameter(s)

Outputs

- ! Tables to be archived: HDET, HIST, PAPV, PHLD, RVEN, RVTX, SAMD, SATT, SATX, SDOC, SNTE, STXL, STXT, SVEN, SVTX, VPID

Completing The Procedure

Cross-Reference

Steps

Solicitations will be selected for archiving when the following criteria are met:

1. The setup date on the solicitation is less than the cutoff date; and
2. There are no requisitions tied to the solicitation.

Determine the parameter(s) to be used for solicitation database archive.

Cutoff Date Parameter

The cutoff date parameter is determined by one of two methods. It is either computed or specifically stated. If it is not specifically stated, the cutoff date is computed by taking the current Fiscal Year and subtracting two years, then converting the product to a calendar year. This is then joined with the BINS Table Fiscal Year End Day and Month and becomes the "cutoff date" for record selection. Otherwise, the specific date stated in the system parameter will be used as the cutoff date. The cutoff date is then used to initially select solicitation records as potential archive candidates. If a specific cutoff date is to be used, the Systems Administrator must provide the date to the person submitting the job so it can be included in the PARM Card.

1.8 Text Database Archive

Overview

The AGPS System Administrator has the responsibility to archive the Text Database in AGPS freeing up the file space for new processing. A text record may not be archived if that text number is found in the check of the following tables. When a text record has been identified for archiving, all related records will also be archived and removed from the text database.

Inputs

! Tables to be checked: COM2, RTXT, STXT

Outputs

! Tables to be archived: TEXT, TXLN

Completing The Procedure

Cross-Reference

Steps

- | | |
|--------------|--|
| TEXT 4: TEXT | <ol style="list-style-type: none">1. Determine the text records to be archived. Text records must be at a status 9' to be a candidate for archiving.2. Verify the TEXT record status = 9. If it is not 9 and record is to be archived;<ol style="list-style-type: none">a. If the user is not in the TEXT screen, type TEXT in the Function Line and press RETURN/ENTER.b. Type INQUIRE in the Function Line.c. Using the TAB key, move to Text Ref Number field and type desired text reference number.d. Press RETURN/ENTER. Requested text reference number record should be displayed.3. Type CHANGE in the Function Line.<ol style="list-style-type: none">a. Using the TAB key, move to Status Code field and type 9.4. Press RETURN/ENTER. <p>NOTE: If an error condition exists, AGPS will display the appropriate error messages at the bottom of the transaction screen. Clear the error conditions identified and press RETURN/ENTER. If no error(s) exists, AGPS will display 'UPDATE SUCCESSFUL'.</p> |
|--------------|--|

1.9 Vendor Database Archive

Overview

The AGPS System Administrator has the responsibility to archive the Vendor Database in AGPS freeing up the file space for new processing. The vendor archive process is designed to be executed jointly by AGPS and AFS. Since each system could have an interest in keeping different vendors on file, each system will use its own criteria to determine its candidates for archiving. The two groups of archive candidates would then be merged, and only those that both systems recommend would be archived. An AGPS vendor will not be a candidate if that vendor number is found in the check of the following tables. When a vendor number has been identified for archiving, all related records will also be archived and removed from the vendor database.

Inputs

- ! Tables to be checked: KINV, KVDL, KVNO, OINV, OPAY, OVNO, RQSN, SVEN
- ! Required processing parameter(s)

Outputs

- ! Tables to be archived: CASV, CGEO, CSVN, VADR, VAWD, VBID, VEND, VNTE, VROL

Completing The Procedure

Cross-Reference

Steps

Vendors will become candidates for AGPS archiving when the following criteria are met:

1. No activity in AGPS/CFMS for (xx) months (date_last_chg_vend is greater than xx months) OR if status_code_vend = >2' irrespective of date_last_chg_vend;
2. Vendor's FEE-PAID-IND not = "Y" (i.e. vendor is not enrolled with State Purchasing as a bidder vendor); and
3. Vendor is not found on: KVNO (is not a contract vendor), OVNO (is not on an order), SVEN (is not on a solicitation), RQSN (is not a recommended vendor on a requisition), KVDL (is not a contract vendor distributor), KINV (is not on a contract invoice), OINV (is not on an order invoice), OPAY (is not on an order payment).

The number of months of no activity must be decided and agreed upon by OSRAP. AGPS creates a file of vendor numbers meeting the above criteria. Once AFS runs its archive program with its own separate criteria, and creates a file of archive candidates, the two files are matched. The only vendors archived will be those agreed on by both systems.